



Wyoming Energy Authority Thoughts

- May 7, 2019
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Wyoming's Energy Resources – Take a Functional Approach

UPSTREAM

- Conventional Oil & Gas
- Oil Shale (PRB, Niobrara)
- Oil Sands (not competitive with Canada)
- Uranium (limited by foreign sources)
- Wind (limited by transmission)
- Hydro
- Solar
- Biomass (trash, sewage recovery)
- Helium (by-product of production)
- CO2 (by-product of production but utilized in EOR)








MIDSTREAM/DOWNSTREAM

- Pipelines (Oil, Gas, NGL's)
- Electric Transmission
- Refining
- Manufacturing
- Electric Generation
 - Coal
 - Natural Gas
 - Wind
 - Hydro
 - Solar
 - Battery
- Rail
- Utility
- Integrated Test Center
- Other

EXTRINSIC VALUE ADD

- Data
 - WPA
 - WIA
 - EORI
 - WOGCC
 - University
 - School of Energy Resources
 - Geologic Association
 - DEQ
- Expertise
 - Mapping
 - Data Integrity
 - Big Data
 - Data Mapping
 - FERC
 - Policy champions
 - Board expertise
 - Business Development
 - Financing
 - Peer to peer linkage

Energy Resource Score Card

- | | | |
|------------------|---|--|
| • Coal |  | • Carbon initiatives |
| • Oil Shale |  | • Powder + export capacity |
| • Natural Gas |  | • More competitive resources |
| • Wind |  | • State transmission constraints |
| • Carbon Storage |  | • Tax credits but... |
| • Uranium |  | • International competition |
| • Data |  | • Hints that key data from some agencies crumbling |

Observations

Envision an expanded role in promoting energy in Wyoming and outside of Wyoming

Data and Data Integrity is key

Assure existing staff that their jobs are secure

Consider Expanding Budget

Look at Competing States

Focus on areas aligned with Legislature and Governor

Consider Expanding Staff

Anticipate market disruptions and technology disruptions as well as external state factors affecting consumption

Consider merging Boards of WPA and WIA

Consider Impediments to Development

Regulatory

Data

Economic (competition for capital with other regions)

Transmission (Constraints plus shifting supply/market dynamics)

Pipeline (shifting supply/market dynamics)

Externalities – what are other states doing and how does that impact Wyoming

WEA Success Depends Upon Vision & Execution



Consider combining WPA and
WIA Boards



Define ideal Executive –
Education, work history,
familiarity with Wyoming,
market prowess



Define strategic objectives



Build business plan



Build Budget



Employee input & retention

Advance a Plan That
Advances State's
Energy Resources
Collaboratively
Across State
Agencies

Anshutz – Power Company of Wyoming



\$406.3 million in property taxes



\$232.4 million in sales and use taxes



\$207.8 million in wind generation taxes



\$846.5 million in potential impact if
transmission can be figured out

Jordan Cove LNG Export Terminal



\$10 billion project



West market for Wyoming gas



Export to Asian markets



Still has no final permits



Just cut spending by \$50 million this year and waiting on permits before issuing final investment decision



May be undercut by project in British Colombia

Colorado Energy Office

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